

# Virtual Facilitation in Practice

Building virtual sessions  
for success



# Planning a Virtual Session

Are you planning a virtual meeting, workshop or check-in with your team or client? Do you want to ensure an **engaging, fun and impactful session**?

Dive into these **practical tips and tricks** on how to design and execute a successful and inspiring virtual session.



# Before the session



## 1. Engage participants before the virtual session

Engage participants in the time leading up to the virtual meeting, so during the meeting you can focus on topics that are really important. Virtual sessions can't last a full day. Therefore you need to start delivering messages before you meet online, in order to conduct more qualified discussions live with the group.

### Levers to use in your virtual session

- Share a **pre-read** with participants
- Assign participants **pre-work** and collect the outcome to share with participants before or during the session
- Conduct an **assessment** of participants' prior knowledge to the subject to gather them around a shared starting point



## 2. Appoint selected participants to role model active participation

In virtual sessions, it can be difficult to get the discussion flowing, and asking or answering questions can be intimidating for participants - especially opening the floor with the first question. Try assigning an active participant role to a few participants. This will help spur interaction and encourage other contributions.

### Levers to use in your virtual session

- Agree to an **opening question with a selected participant** in the meeting and agree if it should be raised verbally or via the chat function (in accordance with the ground rules for the session, see point 3)
- If people are still reluctant to participate, **call on the agreed participants** during plenary discussions to participate

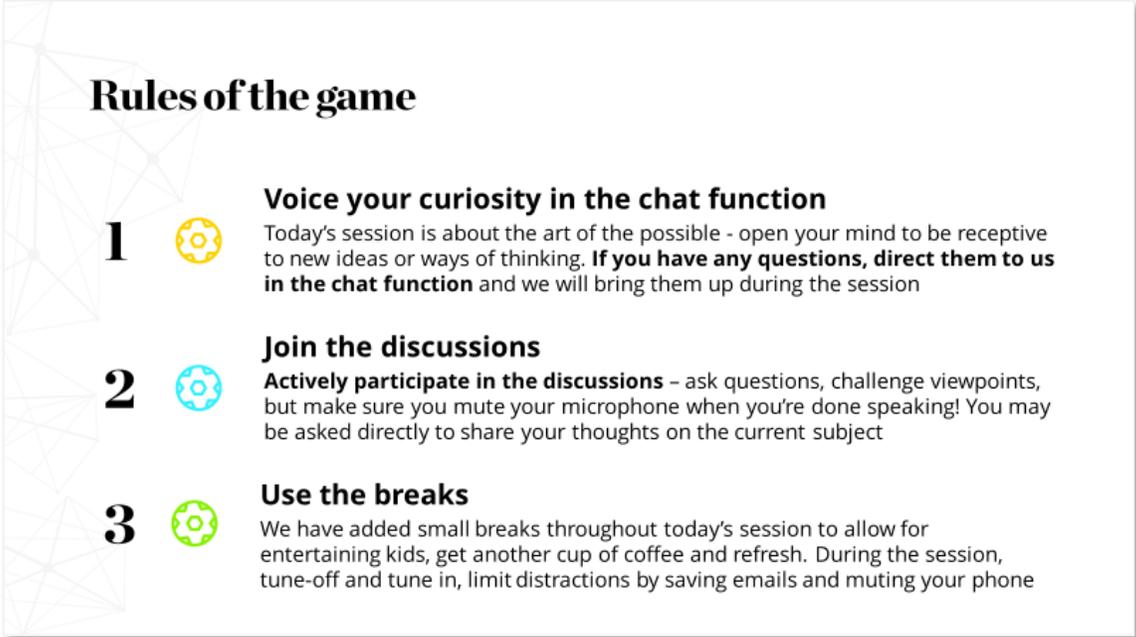
# During the session

## ☆ — 3. Establish ground rules for active participation

Begin all virtual meetings with presenting ground rules for active participation. A successful virtual meeting should be dynamic and allow for dialogue. This requires preparation and engaging presentation on the presenter's end and active participation on the participants' end. Aligning expectations for the virtual meeting emphasizes the responsibilities of each party.

### Levers to use in your virtual session

- ❑ The ground rules of the virtual session should **establish how participants are expected to participate** (verbally, in the chat function, raising a hand, etc.) and when (at designated time outs vs. whenever during the presentation)



### Rules of the game

- 1**  **Voice your curiosity in the chat function**  
Today's session is about the art of the possible - open your mind to be receptive to new ideas or ways of thinking. **If you have any questions, direct them to us in the chat function** and we will bring them up during the session
- 2**  **Join the discussions**  
**Actively participate in the discussions** - ask questions, challenge viewpoints, but make sure you mute your microphone when you're done speaking! You may be asked directly to share your thoughts on the current subject
- 3**  **Use the breaks**  
We have added small breaks throughout today's session to allow for entertaining kids, get another cup of coffee and refresh. During the session, tune-off and tune in, limit distractions by saving emails and muting your phone

*Example*

# During the session



## 4. Divide your session into smaller, digestible time blocks

A challenge with virtual meetings is that participants can quickly mute and zone out. To maintain participants' attention, build your agenda around sizeable time blocks of no more than 30 to 45 minutes - and preferably less - during which you cover a clearly defined topic and convey a limited number of key messages.

### Levers to use in your virtual session

- If the topic allows, plan the meeting **across one or more days** to allow for reflections in between
- Try to ensure **strict time blocks** to discuss specific topics to prevent participant fatigue
- Ensure that the building blocks of the meeting consist of **different formats**, e.g., presentation, discussions, group work, polls, etc.



## 5. Use breaks strategically to support session objectives

Adding breaks in your agenda to allow for coffee re-fills, reflection on key messages or to answer emails is key to ensure that participants can keep their focus throughout a virtual session. Depending on the length of the session, build in numerous breaks and dedicate them to different purposes. Also consider whether the breaks should be taken individually or in groups in assigned breakout rooms.

### Levers to use in your virtual session

- Use **reflection breaks** to anchor key messages or learnings: “Reflect on what we just discussed and we will discuss in plenum/breakouts upon return”
- Use **check-in breaks** to reconnect with participants: “How are you feeling about the session so far?”
- Use **virtual breakout rooms** to allow for group discussions during breaks

# During the session

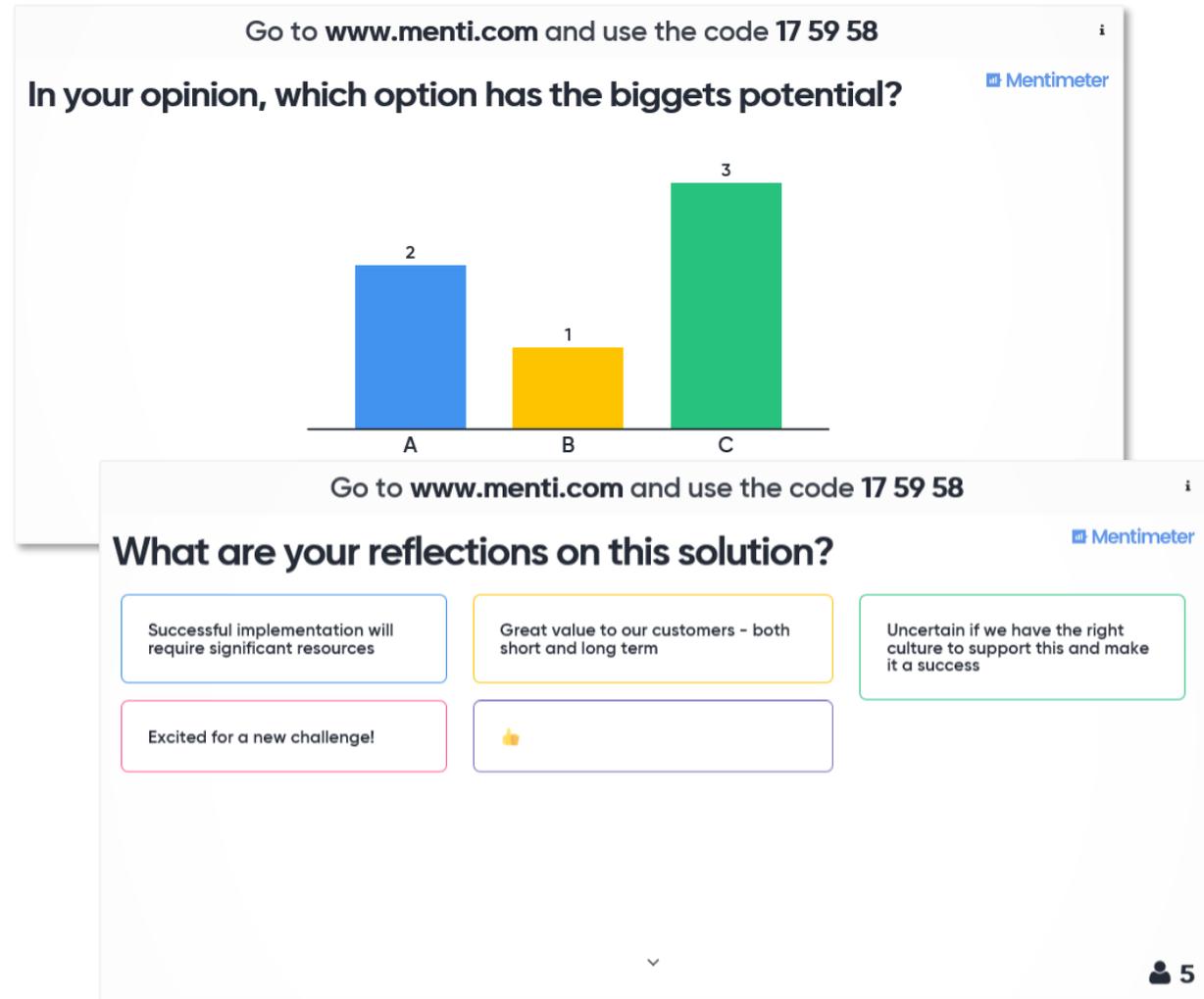


## 6. Build in participation by using the right tools at the right time

Encourage reflection and interaction actively throughout the virtual session to anchor key messages and to engage participants in discussions. Virtual tools can support active involvement of participants during the session; for example Mentimeter allows you to conduct polls, ask open questions, multiple choice, perform Q&A, etc.

### Levers to use in your virtual session

- ❑ **Multiple tools** support asking and answering questions virtually in a structured manner, e.g., Slack and Mentimeter.
- ❑ Think about how you can **ask different types of questions before breaks** and after breaks discuss answers to spark engagement and involvement



Example

# During the session



## 7. Use videos, pictures and graphics to deliver your messages

Much of the energy we build when facilitating in-person centers around the physical energy we bring to the room. This becomes more challenging when you are virtual. Use visual levers to convey or support your key messages, such as videos, pictures and graphics. Too much text on slides causes participants to split their attention between reading and listening. Try to limit the word count and stick to the headlines.

### Levers to use in your virtual session

- Create more slides with less text. If possible, work with **two versions of the same presentation**; one which you show during the meeting with less text and more visuals, and a second which contains the relevant text and is shared with participants afterwards



## 8. Encourage co-creation through digital whiteboards

Using digital whiteboards during the virtual session can increase collaboration between participants and the presenter. Allowing participants to actively contribute to the session builds engagement and sustains attention. However, remember that working with digital whiteboards requires clearly defined rules, e.g., who writes on the board - only the presenter, all or selected participants?

### Levers to use in your virtual session

- Set up a digital whiteboard using the “How To” guide
- Decide whether to use a blank whiteboard page or a pre-defined template, e.g., Kanban board, brainstorm board, root cause analysis board, etc.

# After the session



## 9. Allocate time to receive feedback on the virtual session to improve

Use the last minutes of your virtual session to receive the participants' feedback on the session. Learning how to best work virtually takes time, and you can only become better as a facilitator if you directly request feedback. Make sure to have time for a thorough wrap-up, get participants to confirm that key messages have been understood and align on next steps and expectations going forward.

### Levers to use in your virtual session

- Set up a quick **evaluation scheme** in a virtual tool (e.g., Mentimeter) to request real-time feedback on your session
- Consider **asking follow-up questions** to operationalize the messages from the presentation: “What are the key takeaways?” or “How can key learnings be applied in our work going forward?”



## 10. Think beyond just the virtual session to anchor key messages

While full-day virtual sessions can seem necessary to cover a particular complex or wide topic, the same outcome can be reached by thinking beyond just the virtual session. Consider which follow-up activities and tools you can use to complement the virtual session and what participants can do either in groups or individually offline.

### Levers to use in your virtual session

- Assign participants **homework** in which they actively work with learnings from the virtual session
- Plan **follow-up (virtual) sessions** in which you go through the homework, answer FAQs based on the session, etc.



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